**So I received a referral for a potential client: now what?**

*“Tips for Turning Potential Clients into Success Stories”*

As a lawyer, you receive leads and referrals for potential clients on a daily basis from colleagues, clients, and the Bar Association. The referring person or organization trusts that you will be the right lawyer to help the person. So, when you get the call or e-mail with a referral, what do you do next? Here are some helpful tips.

1. Compassionate Consultations
   * Provide a welcoming office environment.
     + A cheerful, understanding voice on the “front lines”
     + Coffee service or bottled water
     + A clean, uncluttered conference room

* Engage in “active listening.”
* Adopt a posture similar to your guest’s – relaxed? formal? perched on the edge of their seat?
* Absorb what they say and reflect it back in your own words to show you understood them before responding
* Convey that you heard them and want to help, even if you’re not sure at first what help you can provide.
* Make time to meet with potential clients in person or speak with them on the phone. Remember: they want to hear the good news or the bad news about their legal questions *from a lawyer*.
* Make sure your staff provides the same warm welcome and listening ear as you do.
* Set aside the time it takes to provide a substantial consultation, so that, even if the person does not hire you now, they will remember you as someone who cared about their issue and tell others about their positive experience.

1. How strong should I appear when trying to “reel in” a client?
   * When you’re ready to respond, think about the questions: “How can the law help them?” and “Why do they need a lawyer?”
   * Share your experience and wisdom first, not your resume and not your retainer and fee schedule.
   * Offer potential avenues and outcomes, always being careful not to promise anything.
   * Show them that together you and the individual can arrive at a solution to their problem.
   * if you do not perceive a legal remedy, offer other outcomes and avenues, e.g. other agencies and services.
   * When you’re ready for the often awkward conversation about payment, they will already perceive there is value in hiring you and something valuable to be gained from parting with their money.
2. Action Items
   * **If you and the potential client have had a “meeting of the minds” about entering into an attorney-client relationship**, have your paperwork ready and explain it concisely: Acknowledgement of Understanding, a one-page document outlining retainer policy and fees, engagement letter, etc.
   * Schedule the next meeting
   * Remind them of what they need to do next/bring with them to the next meeting and what you are going to do next for them.
   * **If they are not going to retain you**, recap what they can do next outside of a legal solution.
   * **If there is the possibility they may later pursue a case that right now they are not pursuing**, explain the steps they would need to take to re-start the process and remind them of any applicable statutes of limitations.
   * **Even if you think you will never see them again,** end the meeting on an open, positive note. Hand them a card and remind them “If you are anyone you know needs legal advice or help, please call our office anytime.” You never know what additional references and word of mouth advertising will come from that one meeting that seemed not to go anywhere.
   * **Strive to make their time with you the best half-hour of their day!**
   * Follow-up on your tasks soon before they get forgotten.
   * If a potential client was “on the fence” at the end of your consultation about a case you can see working out, consider sending them a letter in 2-3 weeks thanking them for coming and checking in to see if they need anything.
   * Keep good notes to refer back to later.
3. Check out these very helpful resources:
   * **The Complete Guide to Capturing and Converting Phone Leads** from Ruby Receptionists, a Member Benefit Provider of the Akron Bar Association:

<http://www.callruby.com/wp-content/uploads/2018/04/Business-Call-is-Back-022618EBPPSB.pdf>

* **Managing the Pipeline** from *Attorney at Work*, a great daily e-mail blast with helpful practice administration and technology tips:

<https://www.attorneyatwork.com/secrets-of-online-legal-marketing-managing-the-process>

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